



## Memorandum

**To:** Anne Teresa, FSA

**From:** Howard Weitzner, Accenture

**Date:** April 30, 2002

**Subject:** Deliverable 95.1.1c Training Services Summary

### **Purpose**

This memo summarizes the results of Training Services provided to FSA University during the period April 1 – April 30, 2002. The results were delivered through supporting materials and working sessions with FSA University staff. The work effort addressed improvements to FSA University's training services, processes and systems.

### **Initiatives this Period**

Specific initiatives addressed during this period included:

- FSA University strategic planning and organization development
- Training development and delivery methodology/process team
- Delivery cost assessment
- Learning consultant
- Effective teams
- Online performance tools

### **Planned Initiatives**

During the period May 1 – May 31, 2002, the following initiatives may be addressed, but not limited to:

- FSA University strategic planning and organization development
- Training development and delivery methodology/process team
- Training team(s) support
- Delivery cost assessment
- Learning consultant
- Effective teams
- Online performance tools

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**Description of Initiatives**

***FSA University strategic planning and organization development***

Underlying several initiatives is ongoing support for FSA University's efforts to develop and enhance its organizational effectiveness. Activities continue to focus on aligning FSA University's activities with the strategic goals of the organization. For example, support is ongoing for partnering with the TDC as well as action team support to help each team complete major segments of work. Next steps may include enhancing the rigor and accountability of action team status reporting and milestones review.

***Training development and delivery methodology/process team***

The Training Development and Delivery team supports the creation and implementation of best practices for how FSA University develops and delivers training. The methodology (Plan, Design, Build, Deliver, Assess) follows a customized version of the ADDIE model (Analysis, Design, Develop, Implement, Evaluate).

During this period, the process team conducted a preliminary team review of the Build, Deliver, and Assess phase materials. The team continues to work in pairs, dividing responsibilities by phase, then gathering for team reviews. As these efforts progress on parallel tracks, the following target dates serve as the guiding deadlines for the team:

- April 22: Preliminary documents posted to eProject for review
- April 24: Preliminary review of documents conducted
- May 9: Updated documents posted to eProject for review
- May 10-17: Team members review documents individually
- May 21-22: Team gathers for formal review session
- June 3: Target date for completion of materials

Specific activities during this period included:

- Review and refinement of materials for the Build, Deliver, and Assess phases
- Development of the deployment strategy for the training process
- Process briefing to FSAU managers and School Relations managers

The next phases of work may include:

- Review of Build, Deliver, and Assess phase materials
- Development of materials for introducing the process to training teams
- Final review of materials by training process team
- Packaging of materials for use by training teams

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***Delivery cost analysis***

The cost analysis team adheres to the FSAU operating model, Plan, Design, Build, Deliver, and Assess. During April, the team entered the Deliver phase. This included collecting final internal and external delivery cost information and development time estimates for Fiscal Management Training (FMT). Additionally, the team continued to define a communication strategy for the cost analysis tool (CAT) and completed an introductory presentation to be delivered at the May 1 FSAU Manager's meeting.

The team continues to evaluate and revise the CAT data entry approach. This month, formulas, reports, and cost drivers were adjusted. Next month the team plans to integrate the tool with new training development and delivery process. The tool will be used as budget planning and justification tool during the Plan phase of the training process.

Activities during this period included:

- Identification and development of the communications presentation to deploy the cost analysis model
- Collect final cost data and development time for Fiscal Management Training (FMT)
- Data entry checklist created
- Review and revision of the tool
- Deployment of version 1.2 of the tool

Specific activities in the next period may include:

- Demonstrate the tool to FSAU staff member and at the manger's meeting
- Evaluate tool version 1.2 success and revise approach
- Assess FMT training course costs and determine areas where costs can be reduced
- Collect assumption data for Tools for Ensuring Program Integrity training (TEPI)
- Integrate CAT as an effect budget planning tool within the training development delivery process

***Performance (Learning) Consultant***

During this period, the performance consultant team further developed its marketing and deployment approach. Based on the training plan and needs assessment approach, the team began development of a training workshop for FSAU managers. During this workshop, FSAU managers will learn the overall purpose and vision of the performance consultant role, steps involved in its enactment, and needs assessment techniques. This will prepare them to represent FSAU to the organization, conducting needs assessment interviews and publicizing FSAU's products and services.

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***Effective Teams***

During this period, the Effective Teams initiative focused on providing one-on-one project management and planning coaching to the pilot team leads. The team developed and conducted a Phase II: Project Planning & Management Orientation Session for all team leads, created and received approval for tools, and coached pilot teams on how best to utilize the tools. The team also developed a Status Reporting process and Dashboard for tracking overall project status. Other activities included:

- Created and presented a final report and analysis of Phase I results to managers
- Conducted "Phase II: Project Planning & Management Orientation Session" with pilot team leads
- Developed curriculum and conducted Career Zone Skill Exchange: "Planning and Facilitating a Meeting"
- Provided coaching to team leads on project planning and management
- Created project management workplan, timeline and milestones, and communication plan templates
- Conducting research on status reporting best practices and developed status reporting and dashboard templates and process for FSA U.
- Presented Status Reporting process of FSA U managers

***Online Performance Tools***

These tools provide performance support or enable work in a variety of formats. In this period, the team supported FSAU's consideration of eProject and Realize as online performance tools. Regarding eProject, the team continued to identify requirements to better understand eProject's application and utility for FSAU. The team also provided FSAU with access to Realize to assess its potential effectiveness and appropriateness as a management/leadership support tool.

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**Observations/Recommendations**

During the period April 1 – April 30, the following observations were identified and will be reviewed to determine the potential impact/value for FSA University:

- It is advisable to integrate processes across teams. Specifically, training teams would benefit from involving the cost analysis efforts in their initial planning to determine budgeting for their project(s).
- Following the release of the Learning Management System (LMS), feedback was received regarding its usability. Such input should be gathered and batched to identify audience needs and suggestions. Importantly, such feedback should be viewed in context – if the percentage of complaints is small in relation to successful registrants, the response should be in proportion. Audiences will appreciate responsiveness to their concerns, so communication is encouraged. This communication should project and address issues in context and appropriately to the larger context.
- Clear policies for logistics would be helpful for setting expectations and expanding understanding of roles and responsibilities in the development and delivery of training programs.

**Attachments:**

- Training Process Team
  - Checklist
  - Phase overviews
  - Plan phase flow chart
  - Design phase flow chart
  - FSA University training development process deployment strategy presentation
  - Updated training development and delivery process presentation
- Cost Analysis
  - Cost Analysis Tool (CAT) version 1.2
  - Data entry checklist
- Performance (Learning) Consultant
  - Performance consultant action plan
  - Needs assessment interview protocol
  - Performance consultant workshop agenda
- Effective Teams
  - Phase II Anne kick-off letter
  - Phase I project evaluation report
  - Phase II team lead goal sheet
  - Phase II orientation - training design plan
  - Phase II orientation - creating SMART vision
  - Phase II survey
  - Career zone skill exchange - planning your meeting
  - Career zone skill exchange agenda
  - Milestone timeline job aid
  - Milestone timeline template
  - Workplan job aid

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- Workplan
- Status report job aid
- Status report template
- FSA U project dashboard